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# United Kingdom

**2022**

Global MONITOR Market Brief



## About this report

All quantitative findings are from the 2022 Global MONITOR survey data, unless otherwise noted.

The 2022 Global MONITOR survey was fielded from Jan. 6 to April 5, 2022. Insights were collected among 40,000 consumers, ages 13+, in 31 markets around the world.





# United Kingdom

## Money

UK consumers' confidence in their country's economy plummeted during the first year of the pandemic; this level of pessimism has not changed since 2021. During this same period, they feel their own financial situation has only gotten worse, although the rate remains a few percentage-points higher than the global average. This personal downturn is likely the result of the high cost of living, the top money concern among UK residents. About the same percentage is cutting back on spending in anticipation of a recession.

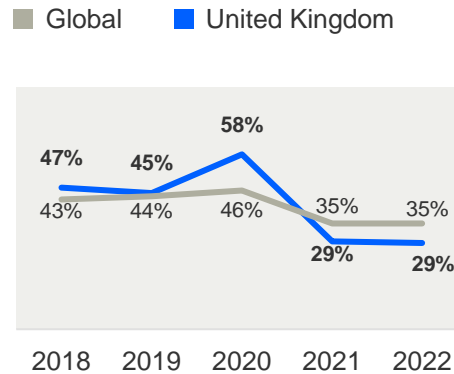


### Lowest level of optimism in recent years

Percentage of customers who agree:

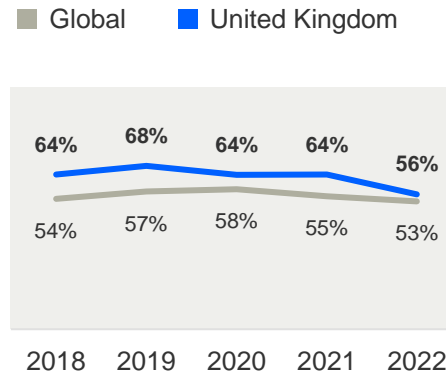
**"Things are going very/fairly well financially in my country"**

+/- 0pts since 2021



**"Things are going very/fairly well with my personal financial situation"**

-8pts since 2021



### Recession Expectations

**43%**

vs. 42% of global consumers

of United Kingdom consumers have changed their spending/saving habits in expectation of a recession in the next 12 months

### Financial Concerns

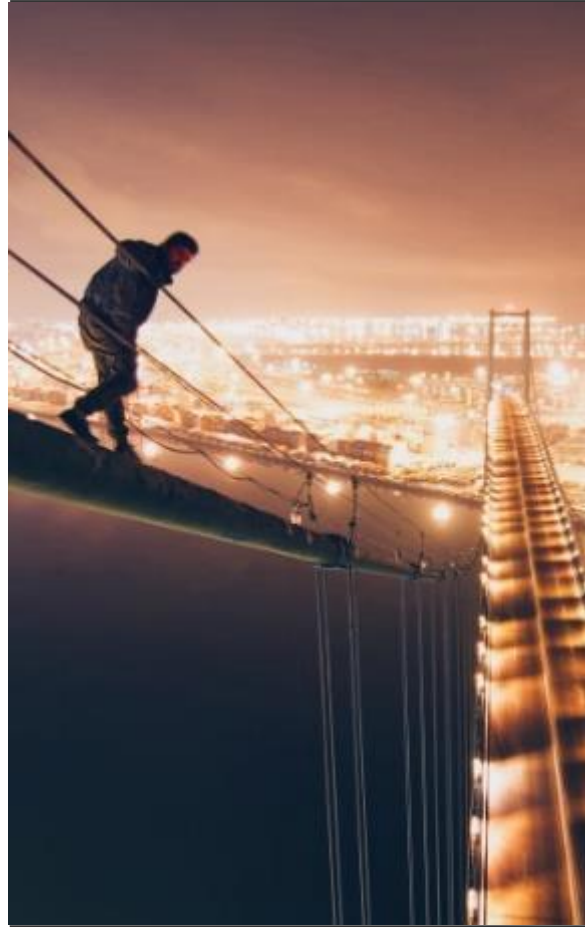
- Keeping up with the cost of living **44%**
- Having enough money to retire on **37%**
- Paying your monthly bills **28%**
- Becoming ill and not being able to work **21%**
- The level of debt you have **19%**
- Paying your rent or mortgage **18%**
- Losing your job / finding a job **17%**



# United Kingdom

## Risks

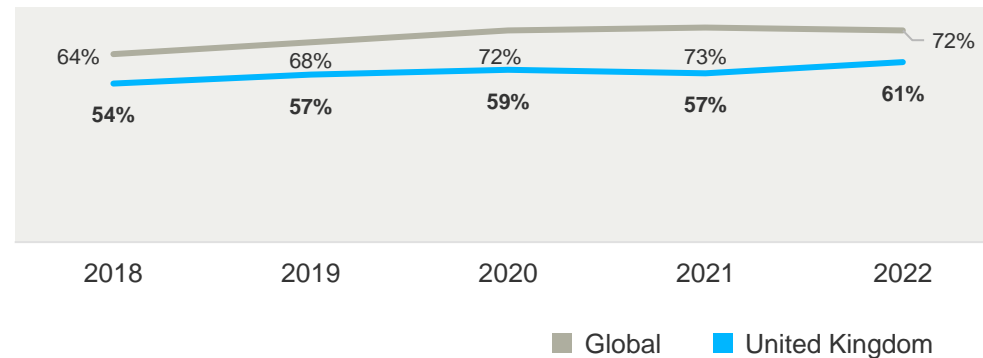
Compared to their peers around the world, UK residents are much less vigilant about the risks around them. They consistently rate their level of concern at least 10 percentage points below the global aggregate; the greatest differences are their low chances of suffering a natural disaster or being exposed to unsafe foods. The only concern that is higher than average—but by only one percentage point—is the likelihood of a recession in the UK.



### Top 3 Risks

- #1 Significant downturn in your country's economy **80%**
- #2 People or companies misusing your personal data (e.g., for credit card fraud or identity fraud) **68%**
- #3 Exposure to pollutants and contaminated air **68%**

Percentage of customers who strongly/slightly agree that they are "Constantly aware of the need to identify and manage risks that surround them in the world today."



### HIGHER than Average

- |   | %   | pts. from avg. |
|---|-----|----------------|
| #1 Significant downturn in your country's economy | 80% | +1             |

### LOWER than Average

- |   | %   | pts. from avg. |
|---|-----|----------------|
| #1 Natural disasters (e.g., earthquake, hurricane, flooding, drought)                       | 40% | -30            |
| #2 Exposure to poor-quality or contaminated food sources                                    | 38% | -27            |
| #3 Public humiliation from a social media post going viral                                  | 20% | -16            |
| #4 Immigrant populations challenging the established values and way of life in your country | 45% | -14            |



# United Kingdom

## Values

The personal values that UK residents share do not differ significantly from those of global consumers, but a few stand out. As a country of net immigration—as opposed to net emigration—since the mid-1990s, mobility ranks higher than average, as do the related values of internationalism and belonging. UK consumers also just want to have fun and to escape their everyday worries. The other characteristics they gravitate toward are individuality and selflessness.

### United Kingdom Values Ranked

(in importance out of 46 values)

*Personal values are defined as things that guide your actions, shape your decisions and give your life meaning.*



	Global Rank		Global Rank
1	Honesty	1	24
2	Family	3	25
3	Health	2	26
4	Fairness	4	27
5	Authenticity	5	28
6	Privacy	8	29
7	Self-reliance	6	30
8	Knowledge	9	31
9	Control	11	32
10	Justice	13	32
11	Mobility	20	33
12	Balance	7	34
13	Empathy	14	34
14	Fun	21	35
15	Humility	12	36
16	Learning	10	37
17	Working hard	18	38
18	Environmentalism	19	39
19	Advocacy	23	40
20	Humanness	17	40
21	Individuality	27	41
22	Mindfulness	15	42
23	Agility	16	43
			43
			44
			44
			45
			45



# United Kingdom

## Sustainability

After centuries of farming, industry and construction, few natural habitats remain in the UK. This is the top sustainability issue among UK residents. The higher-than-average concerns have to do with inflation and its repercussions: the struggle of low-income communities to afford the basic necessities, including food. UK consumers also feel strongly about the unethical treatment of laborers.

### Worries over habitat loss and the effects of soaring prices

Ranking of percentage of consumers who indicate they are concerned a lot about each of the following (3-pt scale)

		Global Rank
1	The loss of natural habitats and green spaces	2
2	<b>People and communities being too poor to properly feed, clothe and house themselves</b>	<b>6</b>
3	Pollution (e.g., air and water pollution)	1
4	Extreme weather conditions (e.g., storms, floods or droughts)	5
5	<b>Unethical treatment of workers in factories and suppliers (e.g., farmers)</b>	<b>9</b>
6	<b>Food shortages</b>	<b>8</b>
7	Toxins in food, drinks and other products	4
8	Discrimination against women	7
9	Water shortages	3





# United Kingdom

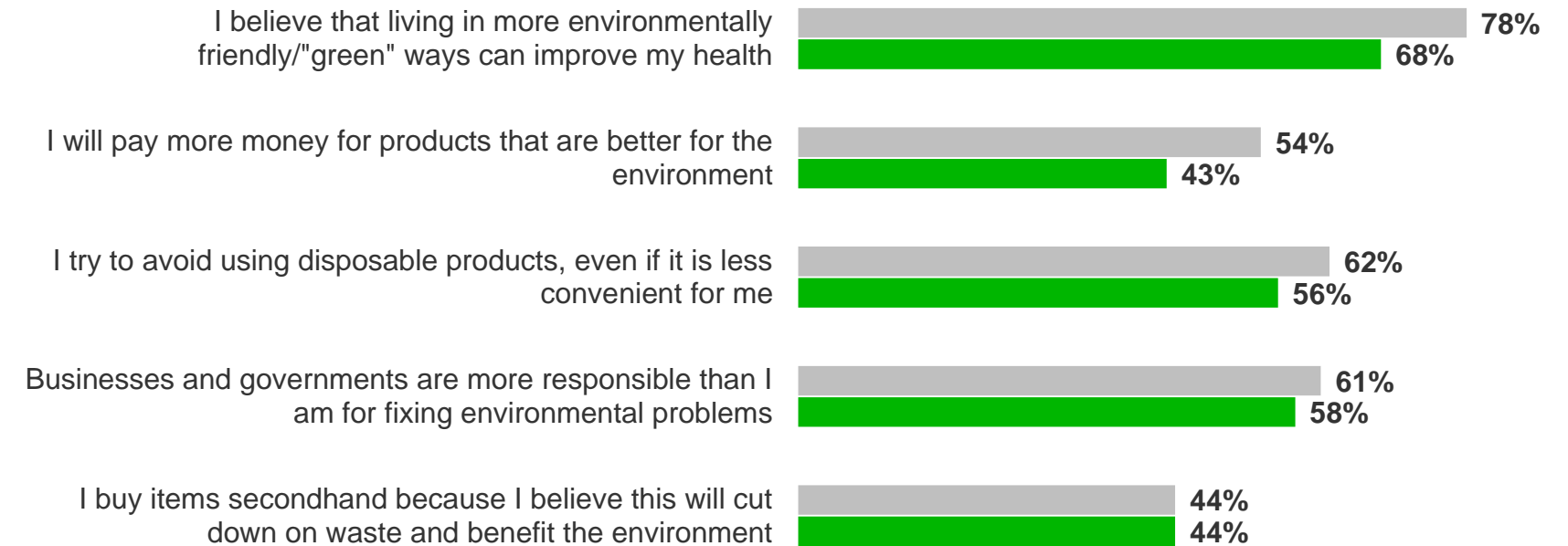
## Environmental Sustainability

The environment is a primary issue for at least a sizable minority of consumers in the UK, although their level of concern and actions is below those of the global average. Sixty-eight percent agree that a more sustainable lifestyle can boost their overall health, yet just 56% are willing to avoid disposable products, and only 43% are inclined to pay more for eco-friendlier products. Almost six in 10 look to governments and businesses to do the greater share of fixing environmental issues.



### UK consumers care about the environment—but less so than their global peers

Percentage of consumers who strongly/slightly agree with the following statements ■ Global ■ United Kingdom





# United Kingdom

## Social Sustainability

More than six in 10 UK consumers believe that their community is very diverse, but they are divided over whether that diversity is accepted or if people are expected to conform; the majority say differences are welcome. UK residents' top discrimination concern is for people with physical or mental disabilities, closely followed by race/ethnicity, physical appearance, and age. However, their levels of concern are consistently below the global average, especially when it comes to social class.



### Lower-than-average concerns over DEI

Percentage of consumers who agree that "My community is ..."\*



### Percentage of Consumers Concerned about Discrimination based on:

	%	pts. from avg.
Physical or Mental Disabilities	62%	-4
Race or Ethnic Background	60%	-1
Physical Appearance	59%	-6
Age	56%	-4
Gender	53%	-6
Social Class	53%	-13
LGBTQ+ People	49%	-2
Religious Affiliation	46%	-8

\*Complete statements are (clockwise, from top left): "My community is very diverse and welcomes people who are from different countries, who speak different languages, practice different religions or have different sexual preferences."/"My community is very diverse, but people are expected to adopt local language, culture and traditions."/"My community is not very diverse and not welcoming to people from different countries, who speak different languages, practice different religions or have different sexual preferences."/"My community is not very diverse, but I believe differences would be welcomed in my community."



# United Kingdom

## Social Sustainability: Businesses

Like their global counterparts, consumers in the UK would like for businesses to be open about the DEI composition of their workforce, ensure the accessibility of their products and services, and do a better job of serving marginalized groups. The two areas that consumers feel more strongly about are the positive depiction of underrepresented groups and making sure those members are found in the boardroom and C-suite.



### More minority groups in ads and the workforce

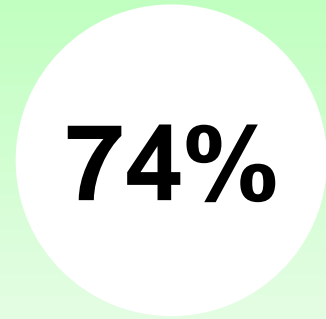
Top 3 important things consumers believe businesses should be doing to improve diversity, equity and inclusion

		Global Rank
1	Be honest and transparent about the diversity and equity composition of their workforce	1
2	Ensure their products or services are accessible to all consumers	2
3	Offer more products that meet the needs of underserved and marginalized groups	3
4	<b>Ensure minority groups are positively represented in their advertising and communications</b>	<b>6</b>
5	<b>Hire and promote underrepresented groups</b>	<b>7</b>
6	Play an important role in social conversations about pressing issues such as gender equality and race or immigrant relations	5
7	Give money to diversity, equity and inclusion organizations/causes	4
8	Participate in celebrations for diverse or marginalized groups	8

Percentage of UK consumers who agree:

**“I believe businesses have a responsibility to make society fairer”**

vs. percentage who agree that: “I don't believe it is businesses' responsibility to make society fairer”



**With no difference**

from the average global consumer



# United Kingdom

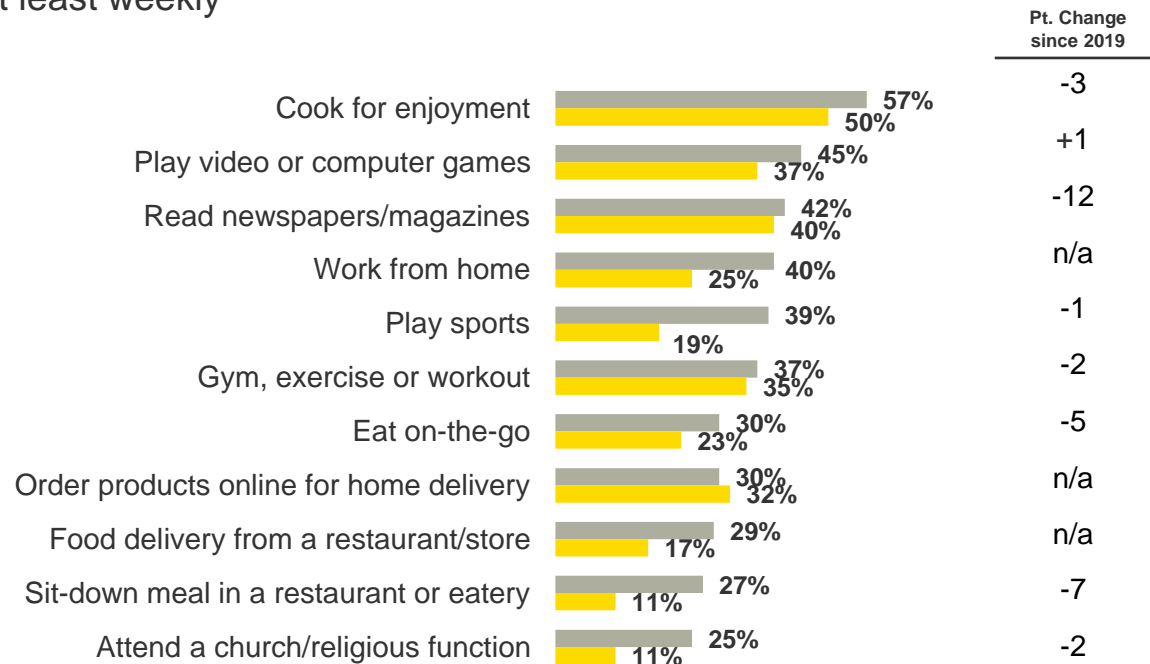
## Lifestyle: Activities

Besides playing video games, which has increased by one percentage point since 2019, consumers in the UK are doing fewer things during their downtime. The biggest dip is in reading magazines and newspapers, followed by meeting friends for drinks and going to the movies. In addition, UK consumers are less engaged in leisure activities than their global peers except for online shopping, drinking alone and gambling.

### WEEKLY Leisure Activities

Percentage of consumers who do the following at least weekly

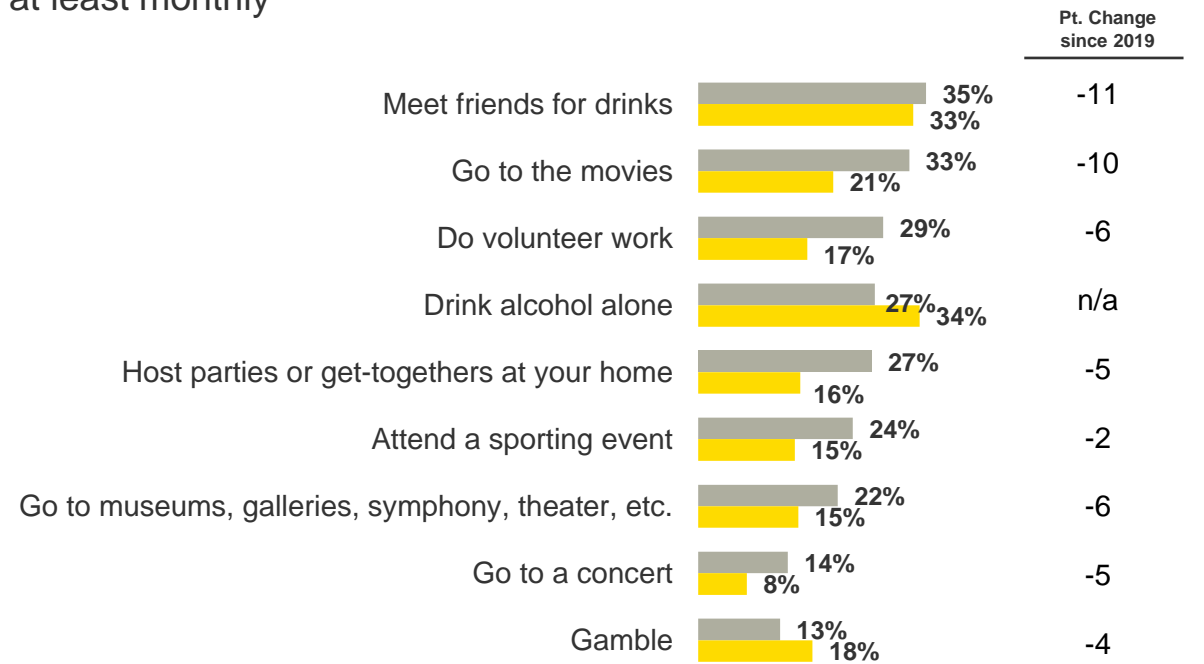
■ Global ■ United Kingdom



### MONTHLY Leisure Activities

Percentage of consumers who do the following at least monthly

■ Global ■ United Kingdom





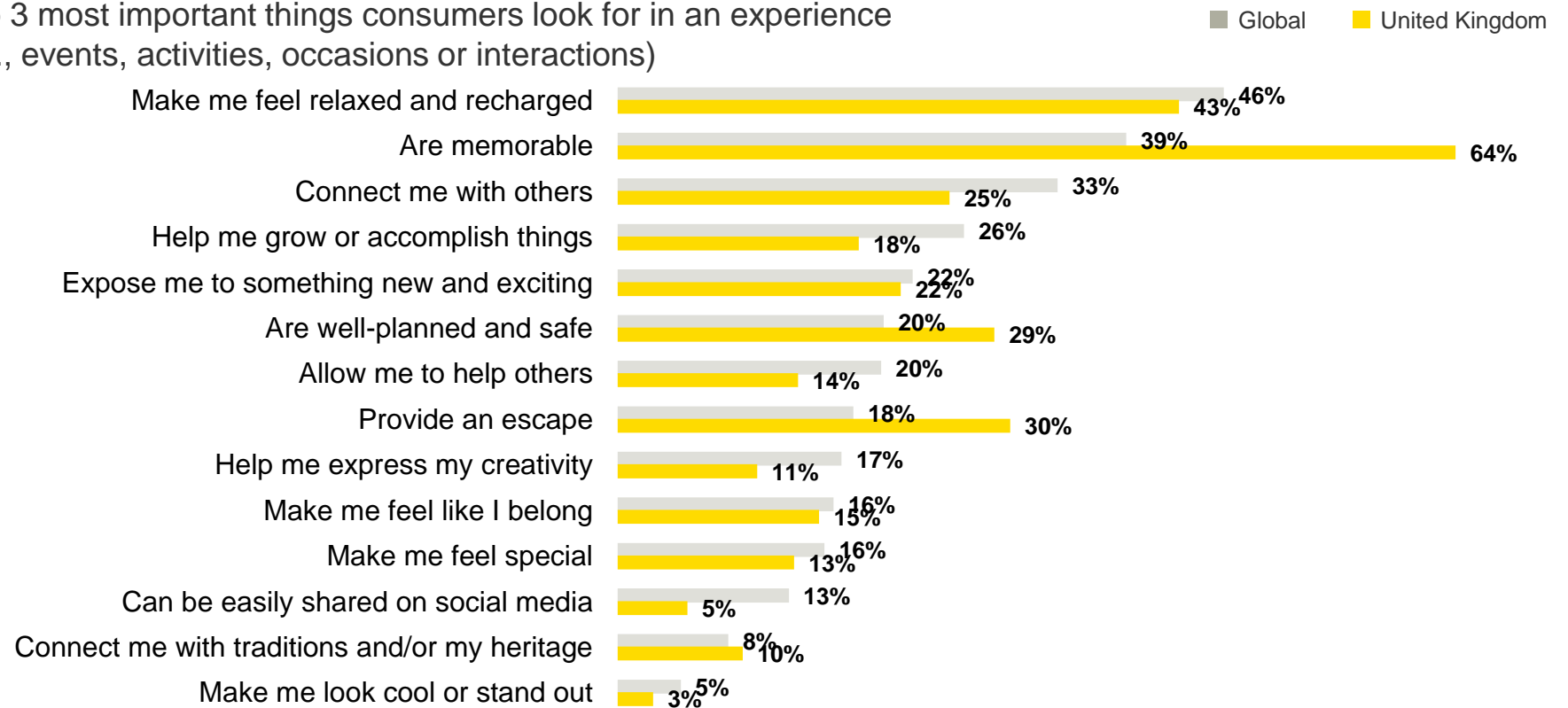
# United Kingdom

## Lifestyle: Experiences

When choosing something to do, UK consumers' first consideration, by far, is whether the occasion will create a lasting impression. They also want safe, well-planned activities that allow them to relax, recharge or escape. In addition, there is a greater preference—albeit slight—for experiences that strengthen connections to their traditions or heritage.

### UK consumers seek experiences that make memories

Top 3 most important things consumers look for in an experience (i.e., events, activities, occasions or interactions)





# United Kingdom

## Lifestyle: Sports

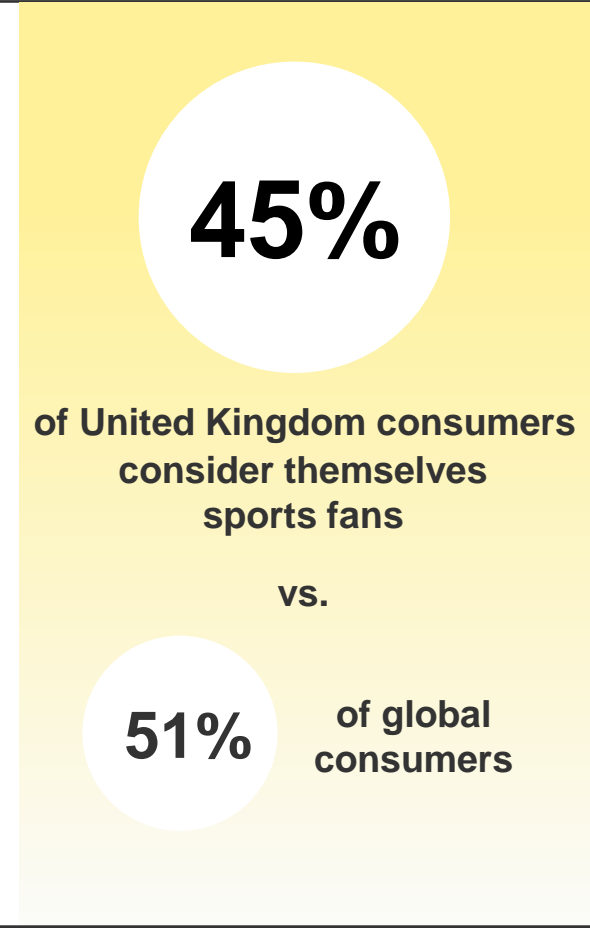
The most popular sport in the UK, as with the rest of world, is association football, although UK consumers follow it at a slightly lower rate. Tennis comes next. In third and fourth places are rugby and cricket, respectively—two sports that originated here and which enjoy a greater-than-average following. Although the UK has made headlines for its passion for football, only 45% of consumers consider themselves sports fans—six percentage points below the global aggregate.



### Fewer followers than average except for rugby, cricket

Percentage of consumers who follow (watch, read or talk about) the following sports

	Global %	United Kingdom %	Sig. Gap pts
Soccer/Association Football	39%	36%	
Basketball	20%	5%	
Tennis	19%	18%	
Volleyball	15%	1%	
Motorsports	14%	13%	
Track and Field/Athletics	12%	8%	
Boxing	12%	10%	
Esports	10%	2%	
Table Tennis	8%	2%	
Baseball	8%	2%	
American Football	7%	6%	
Professional Wrestling	6%	3%	
Golf	6%	8%	
Ice Hockey	6%	3%	
Rugby	6%	17%	+11
Cricket	5%	14%	+9
Field Hockey	2%	1%	





# United Kingdom

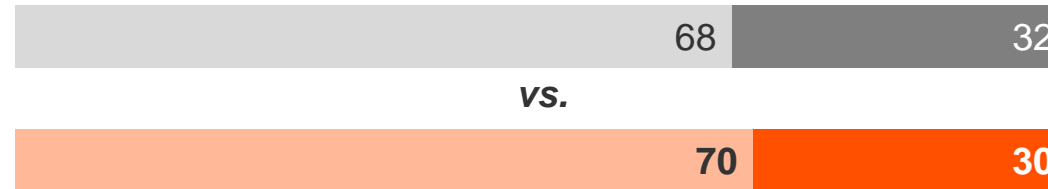
## Work & Success

Seven in 10 consumers in the UK feel they do a good job of keeping their professional life from intruding into their home life; this percentage is slightly higher than the global average. They also tend to believe, a little more than their peers around the world, that they can create their own pathway to success.

### For a large percentage of UK consumers, work stays at work

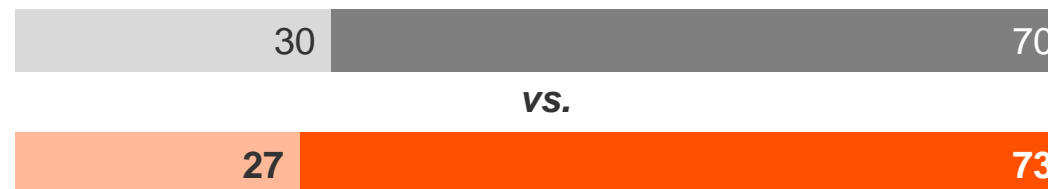
Percentage of consumers who agree with the following statements (statement x vs. y) ■ Global ■ United Kingdom

I have a strict boundary between my work life and personal life



My work life often intrudes into my personal life

I believe that there is a standard path to success in my society



I believe that, nowadays, I can decide on my own path to success



# United Kingdom

## Work & Success

The top four markers of success in the United Kingdom are the same, although in a slightly different order, as the global rankings. Where UK consumers differ is that more of them view being a partner and a parent as important accomplishments. Frequent international travel is another indicator of winning at life.

### More emphasis on having a family, world travel

Ranking of percentage who agree a great deal/somewhat that they personally consider each of the following to be a sign of success or accomplishment



### Top 10 Signs of Success or Accomplishment

		Global Rank
1	Being completely free of debt	2
2	Having a lot of free time to do things I want	1
3	Being a dutiful member of your family	3
4	Setting a good example for others by leading a healthy lifestyle	4
5	<b>Having a partner/spouse and/or children</b>	<b>7</b>
6	Being seen as an expert on a particular topic or skill	5
7	Regularly donating your money or time to help others in need	6
8	<b>Traveling all over the world to many places</b>	<b>11</b>
9	Having a lot of money	8
10	Having high-achieving children	10



# United Kingdom

## Brands & Shopping

When shopping, UK consumers pay attention to the same top-four brand attributes as their global peers. What stands out in this market is a greater-than-average preference for the factors that speak to their national heritage: consumers look for the "Made in the UK" label, favor time-honored brands and want products that reflect the country's patrimony. Along a similar vein, customization and the latest features rank lower here than around the world.



### A greater penchant for UK heritage brands

Ranking of percentage who agree that the following are essential/important when making a decision about buying a brand or product

### Purchase Decision Factors

		Global Rank
1	A complete list of its ingredients or what goes into its products	1
2	It puts the wellbeing of the planet ahead of profits	2
3	It is completely transparent about all of its business practices (e.g., supply chain, donation activity, etc.)	3
4	It is genuinely invested in improving the local communities it operates in	4
5	Its products are made in my country	6
6	<b>It is a well-known brand that has been around a long time</b>	<b>8</b>
7	<b>It has a sense of authentic history and heritage</b>	<b>9</b>
8	It allows me to customize or personalize its products to better fit my needs or preferences	5
9	It is regularly recommended by family/friends	10
10	It does not support political issues or candidates that I dislike	11
11	It has all the latest features and technological advancements	7
12	It has celebrity endorsements	12



# United Kingdom

## Brands & Shopping: eCommerce

Consumers in the United Kingdom may search for better deals when shopping online, but only 32% tend to browse non-UK e-commerce sites—nine percentage points below their global counterparts’ preference. In addition, fewer consumers in this market use "buy now, pay later" services, and just 8% send remittances to family and friends in other countries.



### Consumers keep money in the UK and pay now rather than later

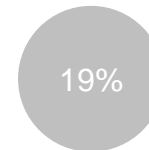
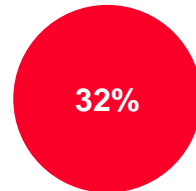
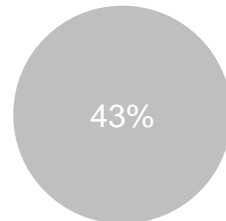
Percentage who agree that the following describes their behavior with regard to online shopping and payments

■ Global ■ United Kingdom

I will sometimes buy products online from outside of my home country to get a better deal

I use “buy now, pay later” services

I send money to friends and family in other countries





# United Kingdom

## Health

While consumers in the UK agree with the rest of the world that getting enough sleep is the most important factor for holistic health, they place a lower-than-average priority on practically everything else. Especially notable is their belief that organic foods, an attractive appearance, regular checkups or mindfulness techniques do not make much of a difference to their personal wellbeing.



### For UK consumers, fewer things are important to their wellness

Percentage of consumers in the United Kingdom and globally who agree the following is important to their **personal wellbeing**, and the respective percentage-point gaps

	United Kingdom %	Global %	+/- ppts
Getting enough sleep	83%	83%	--
Taking time to slow down and relax	73%	77%	-4pts
Maintaining a healthy weight	74%	76%	-2
Maintaining social relationships with friends and family	75%	75%	--
Being able to access high-quality and affordable health care	60%	74%	-14
Managing your stress levels	69%	72%	-3
Having a well-balanced diet	70%	72%	-2
Avoiding germs and pollutants that could make you sick	57%	70%	-13
Exercising on a regular basis	63%	65%	-2
Looking fit and attractive	43%	63%	-20
Getting regular health checkups from a doctor or medical professional	46%	61%	-15
Having the tools to monitor your own health on a regular basis	44%	57%	-13
Eating organic, natural food	28%	53%	-25
Meditating or doing other mindfulness techniques	28%	43%	-15
Regularly consult with a mental health professional	26%	37%	-11
Consulting with practitioners of more traditional healing practices (e.g., acupuncture, homeopathy, etc.)	23%	37%	-14



# United Kingdom

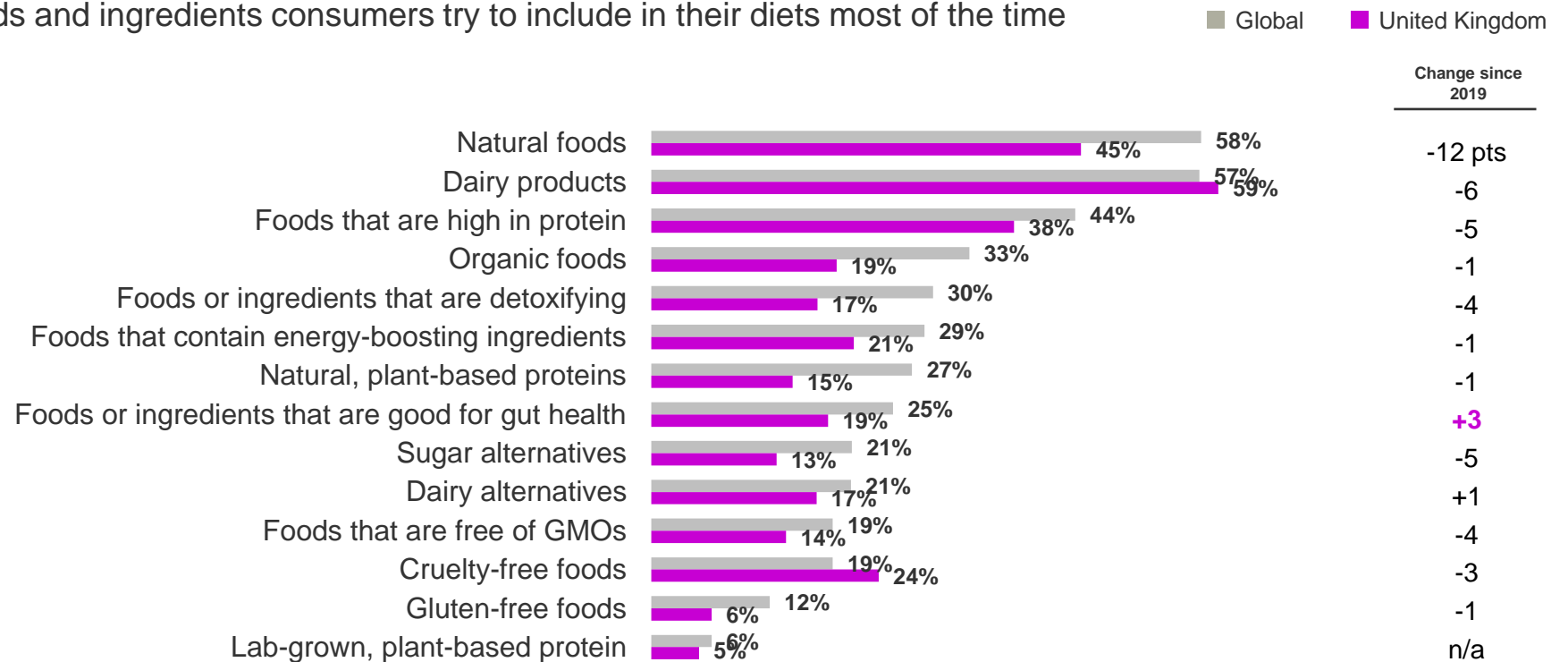
## Health

When making their grocery list, consumers in the UK most often include milk, cheese, yogurt and the like—although these preferences have fallen in the past few years. Experiencing an even greater drop is their tendency to include natural foods in their diet. Of the items on the list below, the only things that UK consumers are buying more of now than in 2019 are ingredients that promote gut health and dairy alternatives.



### Dairy still high on the shopping list, but not like before

Foods and ingredients consumers try to include in their diets most of the time





# United Kingdom

## Health

About three-quarters of UK consumers actively try to be healthier, a percentage that's similar to the global average. An even greater percentage believe that it is up to them to safeguard their own health, with only 18% believing that it's a responsibility they share with corporate entities, their community or governmental agencies.

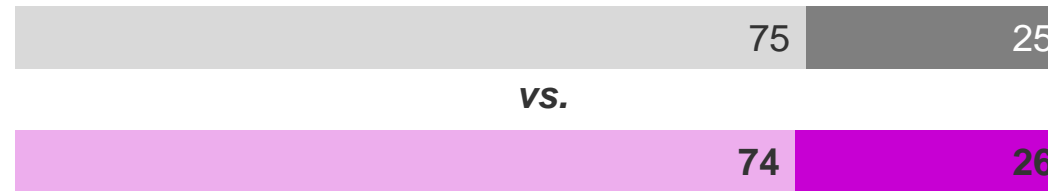
### UK consumers feel more responsibility for their wellbeing than global average

Percentage of consumers who agree with the following health statements (statement x vs. y)

■ Global ■ United Kingdom

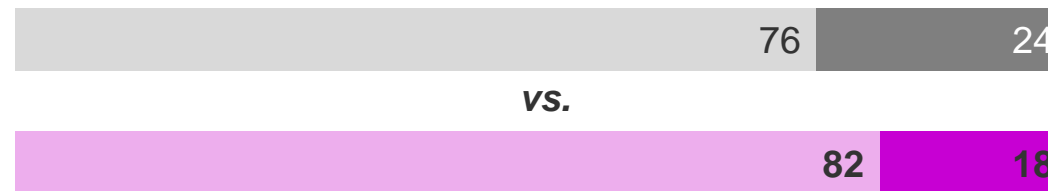


I am actively trying to improve my health



I do not currently need to improve my health

I believe that looking after my health is entirely my own responsibility



I believe that looking after my health is a shared responsibility (myself, companies, community, country)



# United Kingdom

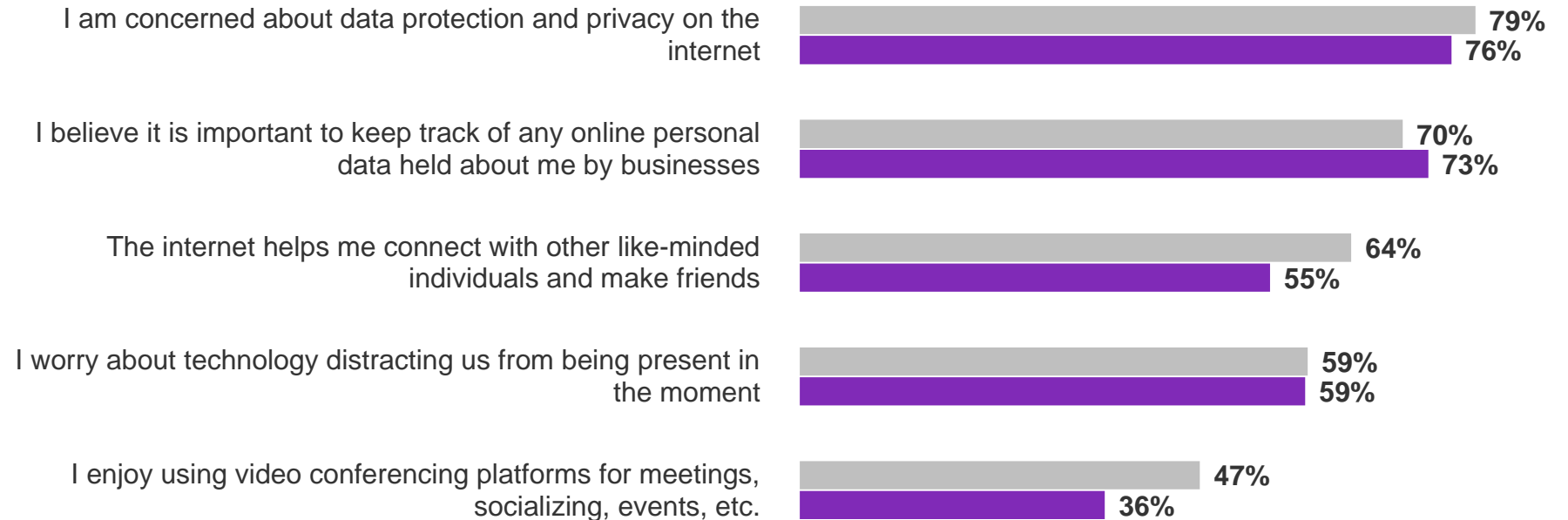
## Technology & Social Media

A smaller percentage of consumers in the United Kingdom worries that their personal data are not well-protected than elsewhere in the world, but they think it is important to know what information businesses have about them. Compared to their peers around the world, fewer UK consumers feel that the internet increases their connections with others who share their interests, and only 36% enjoy meeting or socializing via video conferencing.

### A greater desire for data transparency, less for video conferencing

Percentage of consumers who agree with the following statements

■ Global ■ United Kingdom





# United Kingdom

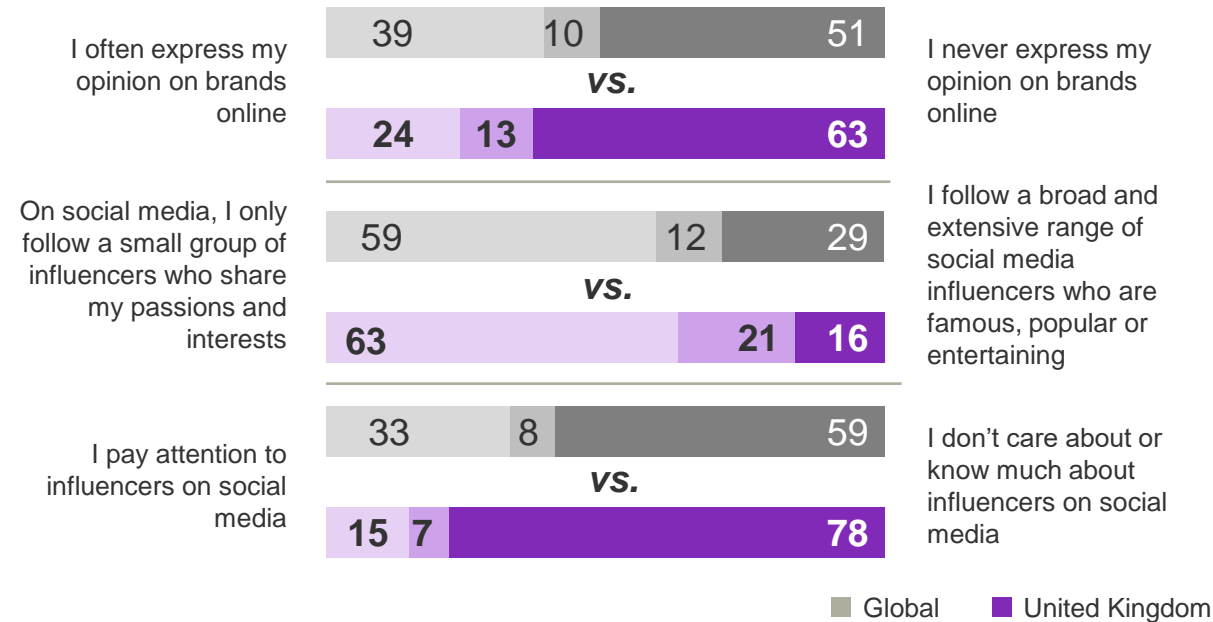
## Technology & Social Media

Consumers in the UK may have strong opinions about brands, but they are quiet about it on social media. Fewer than one-quarter of consumers frequently post their opinions about brands, and only 20% think it's very or extremely important to have an active presence in the online world. Even fewer care about following influencers or getting ideas from them.



### Consumers in UK pay little attention to influencers

Percentage of consumers who agree with the following technology statement (statement x vs. y - with neutral included)



### Social Media Involvement

Percentage of consumers who say the following social media statements are extremely or very important to them personally:

